



ATTENTION

Probate cases on this calendar are currently under review by the probate examiners. Review of some probate cases may not be completed and therefore have not been posted.

If your probate case has not been posted please check back again later.

Thank you for your patience.

DOD: 8-29-08		<p>DIANE PICKERING was appointed Executor with Full IAEA without bond and Letters issued on 1-13-09.</p> <p>On 1-26-12, the Court set status hearing for failure to file a First Account or Petition for Final Distribution.</p> <p>Minute Order 3-14-12: Counsel advises the Court that there is an insurance issue that he is trying to resolve.</p> <p>Minute Order 5-2-12: Matter continued to 6-20-12. Counsel is directed to file the required items by 6-20-12.</p> <p>Minute Order 6-20-12: Matter set for status on 9-21-12.</p> <p>Minute Order 9-21-12: No appearances. The Court sets the matter for an Order to Show Cause regarding failure to appear and imposition of sanctions in the amount of \$450.00. Sheldon Feigel is ordered to be personally present on 9-28-12.</p> <p>Minute Order 9-28-12: Counsel advises the Court that he is waiting on the assets from the estate. The Order to Show Cause is dismissed.</p> <p>Minute Order 3-15-13: Counsel informs the Court that they may be administering this matter outside of Probate. Counsel requests a two month continuance.</p> <p>Minute Order 5-17-13: No appearances. The Court sets the matter for an Order to Show Cause on 7/12/13 regarding Sheldon Feigel's failure to appear and imposition of sanctions in the amount of \$500.00. The Court orders Sheldon Feigel and Diane Pickering to be personally present on 7/12/13. The Court indicates for the minute order that it will be addressing the issue of removing Diane Pickering as executor at the next hearing. Continued to 7/12/13 @ 9:00 a.m. Dept. 303; Set on 7/12/13 @ 9:00 a.m. Dept. 303 for: Order to Show Cause Re: Failure to Appear; Imposition of Sanctions in the Amount of \$500.00.</p> <p>A copy of the minute order and Order to show Cause was mailed to Mr. Feigel and Ms. Pickering on 5-21-13.</p> <p>On 6-27-13, Attorney Feigel filed an ex parte petition to change the hearing date because he would be out of town on the continued date. The Court granted the request and continued the matter to 8-9-13. <u>However, the ex parte request did not provide the status of the estate, and nothing further has been filed.</u></p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p><u>Note: Executor was appointed in January 2009 (over four years ago). This is the 7th status hearing regarding failure to file I&A and account.</u></p> <p>The original petition indicated an estimated estate value of \$130,000.00 in personal property (<i>nature unknown, as I&A has not been filed</i>).</p> <p>Decedent's will devises the entire estate to The Mildred Pearl Rancilio Living Trust.</p> <p><u>The following issues remain:</u></p> <ol style="list-style-type: none"> 1. Need Inventory and Appraisal. 2. Need First Account Current or Petition for Final Distribution pursuant to Probate Code §12200. 3. A Request for Special Notice was filed 4-29-13 by Mary Catherine Cooper, beneficiary of the trust. Any further hearings must be properly noticed by the Executor per Probate Code §1252.
Cont. from 031412, 050212, 062012, 092112, 092812, 031513, 051713			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt	X		
UCCJEA			
Citation			
FTB Notice			

Reviewed by: skc
Reviewed on: 8-6-13
Updates:
Recommendation:
File 1A - Rancilio

Order to Show Cause Re: Failure to Appear; Imposition of Sanctions in the Amount of \$500.00

DOD: 8-29-08	DIANE PICKERING , a family friend, was appointed Executor with Full IAEA without bond and Letters issued on 1-13-09.	NEEDS/PROBLEMS/COMMENTS:
	Inventory and Appraisal was due in May 2009.	
Aff.Sub.Wit.	First Account or Petition for Final Distribution was due in May 2010.	
Verified		
Inventory		
PTC	<i>No status report has ever been filed; however, the minute orders reflect various updates from the attorney over the course of the past year. See Page 1A.</i>	
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.	After numerous hearings re: failure to file I&A or First Account or Petition for Final Distribution, or any other status report pursuant to Local Rule 7.5, including various dates where there were no appearances (See Page 1A), the Court set this Order to Show Cause for imposition of sanctions in the amount of \$500.00 and possible removal of the Executor.	
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt	<u>Note:</u> The continued status hearing and this OSC were both originally set for 7-12-13; however, pursuant to Attorney Feigel's ex parte request, the date was changed to 8-9-13. A copy of the order on the ex parte request was mailed to Attorney Feigel.	
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: skc
		Reviewed on: 8-6-13
		Updates:
		Recommendation:
		File 1B – Rancilio

Status Hearing Re: Settlement Agreement

		<p>JAMES LOUIS ROBERTS, Executor, filed a petition for determination of the beneficiaries under the will and for final distribution .</p> <p>Executor requested the court find that West Park Baptist Church was the beneficiary of the remaining estate consisting of \$119,359.98.</p> <p>ANNA B. HINLEY and FRANCES ALBERS, Trustees of the Chester and Lorene Living Trust dated 4/12/07 filed objections requesting distribution of 50% interest in the net Estate be made to the Chester and Lorene Living Trust dated 4/12/2007, and that the Estate be ordered to reimburse Gary Bagdasarian the sum of \$18,095.71 as compensation for services on behalf of the Objectors.</p> <p>Minute Order 1-2-13: Greg Roberts appearing via conference call. Ms. Lind objects to the payment of fees to Mr. Bagdasarian's client. The Court sets a Settlement Conference on 3/4/13. The Court directs counsel to submit their Settlement Conference Statements on week before the hearing. Matter set for Court Trial on 3/15/13 with a one day estimate.</p> <p>Minute Order 3-4-13: Also present in the courtroom are Donna Wyatt and Gail Brown. Frances Albers is appearing via conference call. Parties reach a settlement agreement as fully stated on the record by Mr. Roberts. Parties agree that the trust will waive any and all claims as to the Probate estate. In addition, parties agree to waive further accountings of the trust and estate and all objections are withdrawn. Upon inquiry by the Court, each party individually agrees to the terms and conditions of the settlement agreement. Mr. Roberts is directed to prepare the settlement agreement. The settlement agreement and order regarding the withdrawals from the blocked account(s) to be submitted on an ex parte basis. Set on 3/29/13 at 9am in Dept 303 for Status Re: Settlement Agreement</p> <p>Order signed 3-15-13 provides at #8: "The beneficiary of the amount of \$119,359.98 will be covered in the Settlement Agreement."</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>Minute Order 3-29-13: Mr. Bagdasarian informs the Court that they are waiting on the final document to be executed.</p> <p>Minute Order 5-10-13: Mr. Roberts advises the Court that he has all the changes to the agreement and all he needs to do is put it together. Mr. Roberts further advises that he may have the final version out to everyone today.</p> <p>Note: Status Report filed 6-5-13 states no response has been received from the other counsel. Proposed agreement is attached, but not signed.</p> <p>Minute Order 6-7-13: Mr. Roberts informs the Court that the agreement is ready to be signed. Continued to 7-12-13.</p> <p>1. Need Settlement Agreement and Order for Distribution according to Settlement Agreement <u>or verified written status report.</u></p> <p>Note: See Update on Page 2.</p>
Cont. from 032913, 051013, 060713, 071213			
Aff.Sub.Wit.			
Verified			
Inventory			
PTC			
Not.Cred.			
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order	X		
Aff. Posting			
✓ Status Rpt			
UCCJEA			
Citation			
FTB Notice			

Page 2

Status Report filed by Gary Bagdasarian, attorney for beneficiaries Anna B. Hinley and Frances Albers, states Attorney Gregory J. Roberts was asked to prepare and has provided a draft Settlement Agreement. Attorney Bagdasarian has provided proposed changes. A final Settlement Agreement has not been received as of 5-8-13. Upon receipt, the attorney will review and provide any final requests for modifications and approval.

Status Report filed by Ruth P. Lind, attorney for Executor James Louis Roberts, states the proposed agreement did not accurately reflect the agreement of the parties. Stefanie Krause prepared a form of suggested revisions and emailed them to Mr. Roberts and Mr. Bagdasarian on 3-25-13. On 3-30-13, Mr. Roberts responded that Mr. Bagdasarian's changes were not included in her revision, but that if it was sent in Word, he would incorporate all changes into one new document. The document was sent as requested to Mr. Roberts on 4-1-13.

Mr. Roberts and his clients did not attend the status hearing on 3-29-13 and the Court continued the matter to 5-10-13. Stefanie Krause followed up with an email to Mr. Roberts on 5-4-13; however, to date, there has been no communication from Mr. Roberts.

Status Conference Declaration filed 6-5-13 by Attorney Gregory J. Roberts for Trustee Gail Brown states on 5-24-13, he emailed to counsel Ruth Lind, Stefanie Krause and Gary Bagdasarian what he believed to be a final settlement (attached). He has not heard anything from counsel regarding additional changes or whether or not the agreement as written is acceptable. He emailed again on 6-5-13.

Attorney Roberts believes the matter has settled and the attached agreement correctly reflects the agreement of all parties with all of the changes made by counsel.

Note: The settlement agreement attached, which provides for a distribution of \$69,000.00 to the 2007 Trust, with the assets remaining to be used for costs and fees of administration, with the remainder to West Park, is not signed.

Update: A Settlement Agreement was filed on 7-22-13; however, it is signed only by the Executor and his attorneys Ruth Lind and Stefanie Krause. Signature lines for Gail Brown, Trustee of the Chester & Lorene Beeler Living Trust, and Donna Wyatt, Objectors, their attorney Gregory Roberts, Anna B. Hinley and Frances Albers and their attorney Gary Bagdasarian, and Elizabeth Beeler Rogers and John H. Beeler, are blank.

Atty Johnson, Chris (pro per – son/former Executor)

Atty Kruthers, Heather H. (Public Administrator – Successor Administrator)

Probate Status Hearing Re: Filing of the First Account or Petition for Final Distribution

DOD: 09/26/08	CHRIS JOHNSON , son, was appointed Executor and Letters were issued on 10/21/10.	NEEDS/PROBLEMS/COMMENTS: <u>CONTINUED FROM 07/12/13</u> Note: The Public Administrator was appointed successor administrator on 05/10/13. 1. Need First Account or Petition for Final Distribution.
Cont. from 121511, 020912, 052412, 071212, 080912, 100512, 111612, 011113, 022213, 041213, 051013, 071213	Minute Order from hearing on 10/21/10 set this matter for status for filing the First Account or Petition for Final Distribution on 12/15/11. An Inventory & Appraisal was filed 01/26/11. Letters of Administration were issued to the Public Administrator on 05/24/13. Status Report Regarding Final Report filed 07/05/13 states: Deputy Public Administrator Noe Jimenez met with the former Administrator, Mr. Johnson. Mr. Johnson was ordered not to sell any property without court approval; however, he stated that he already sold the Helm Street property. Mr. Johnson reported that both houses had deeds of trust and that he sold the one house so that there would be no deeds of trust on the house. Mr. Johnson reported that he still has the 2004 Mercedes and 1996 Jeep. He stated that he does not want to sell the Mercedes because he uses it for work. In order to determine the status of the second real property and sell one or both vehicles and then prepare the final account, the Public Administrator requests the next status hearing be set at least 4 months out.	
Aff.Sub.Wit.		
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Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
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Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
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Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
		Reviewed by: JF
		Reviewed on: 08/06/13
		Updates:
		Recommendation:
		File 3 – Johnson

Status Hearing Re: Confirmation of Receipt of Transfer

Age:			NEEDS/PROBLEMS/COMMENTS:		
DOD:					
Cont. from					
	Aff.Sub.Wit.				
	Verified				
	Inventory				
	PTC				
	Not.Cred.				
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	Pers.Serv.				
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	Letters				
	Duties/Supp				
	Objections				
	Video Receipt				
	CI Report				
	9202				
	Order				
	Aff. Posting				
	Status Rpt				
	UCCJEA				
	Citation				
	FTB Notice				
				OFF CALENDAR Notice of Receipt of Papers and Pleadings filed 07/18/13	
				Reviewed by: JF	
			Reviewed on: 08/06/13		
			Updates:		
			Recommendation:		
			File 4 – Havens		

Status Hearing Re: Confirmation of Receipt of Transfer

Age:		NEEDS/PROBLEMS/COMMENTS:
DOD:		
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
Order		
Aff. Posting		
Status Rpt		
UCCJEA		
Citation		
FTB Notice		
OFF CALENDAR. Receipt for Transfer filed on 8/5/2013		
Reviewed by: KT		
Reviewed on: 8/6/2013		
Updates:		
Recommendation:		
File 6 – Anderson		

		<p>CAROLYN BATES-WELCH, trustee of the Cynthia Welch Special Needs Trust filed her Third Account and Report of Trustee on 05/21/13.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need bond in the amount of \$250,000.00 or current written status report pursuant to Local Rule 7.5, which states: In all matters set for status hearing, verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
Cont. from		<p>The Order Approving Third Account and Report of Trustee was signed 07/11/13. Pursuant to the Order, bond was to be increased from \$125,000.00 to \$250,000.00.</p>	
	Aff.Sub.Wit.		
	Verified	<p>Minute Order from hearing on 07/11/13 set this matter for status regarding filing the increased bond.</p>	
	Inventory		
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		
			<p>Reviewed by: JF</p> <p>Reviewed on: 08/06/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 7 – Welch</p>

Probate Status Hearing Re: Filing Account

DOD: 11/06/06		NAGLAA K. ALAMELDIN , sister, was appointed Administrator with full IAEA and bond of \$190,000.00 on 01/02/07.	NEEDS/PROBLEMS/COMMENTS: <u>Minute Order 10-4-12:</u> Counsel advises the Court that he is not in a position to complete the accounting as he is still trying to collect the assets. Counsel requests a continuance. Matter continued to 11-30-12. <u>Minute Order 11-30-12:</u> Counsel informs the Court that there is a judgment for about \$20,000.00 with interest against the actual mother of the children. Matter continued to 2/1/13. The Court informs counsel that it will expect an update at the next hearing as to the progress of the other account and what is being done to collect the judgment. Continued to 2-1-13. <u>Minute Order 2-1-13:</u> Counsel informs the Court that he has been in contact with the State's unclaimed property division. Counsel is directed to submit a status report. 1. Need Final Account and Petition for Final Distribution or current status report.
Cont. from 100412, 113012, 020113, 040513, 060713			
Aff.Sub.Wit.		NAGLAA K. ALAMELDIN filed a Status Report of Administration of Estate and Petition to Approve First Account on 09/21/10.	
Verified			
Inventory		The Petition to Approve First Account was continued several times (11 hearings total) and the Court denied the Petition with leave to Amend on 06/04/12.	
PTC			
Not.Cred.		Minute Order from hearing on 8/6/12 set this matter for status regarding filing the account.	
Notice of Hrg			
Aff.Mail			
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
Order			
Aff. Posting			
Status Rpt	X		
UCCJEA			
Citation			
FTB Notice			
			Reviewed by: KT / skc
			Reviewed on: 6-5-11
			Updates:
			Recommendation:
			File 8 - Alameldin

Page 2

Status Report filed 6-6-13 by Attorney Rindlisbacher (not verified by Administrator) states funds totaling \$69,425.63 should be received in the next 30 days from CA State Controller unclaimed property. We are working with Bank of American to obtain a satisfaction of creditor's claim that has been paid. **A guardianship of the estate will need to be established for minor beneficiaries before distribution can be made.** They reside with their mother, who would have the right to be appointed; however, we would recommend that if this probate estate were distributed to her as guardian of the estate that the funds be placed in blocked accounts, as the estate has a judgment against her in the amount of \$13,869.21 entered 9-20-07. Interest is accruing at the legal rate and the amount she now owes is \$21,796.01. **Administration should continue until a guardianship of the estate has been established for each minor child.**

Minute Order 6-7-13: Counsel advises the Court that they will not be filing a guardianship as that responsibility falls on the mother. Counsel further advises that they are hoping to receive the proceeds within 30 days. Continued to 8-9-13.

As of 8-6-13, nothing further has been filed.

Atty Matthai, Edith (for Craig A. Houghton – Objector)

Atty Manock, Charles K. (for George Salwasser/Executor of the Estate of Lillian Salwasser)

Atty Chielpegian, Michael S (for Marvin Salwasser/Administrator with Will Annexed of Walter Respondent)

Salwasser

Atty Wright, Janet L. (for George Salwasser/Executor)

Atty Farley, Michael L. (of Visalia, for Gary E. Salwasser - Beneficiary)

Status Hearing

		George Salwasser is Executor.	NEEDS/PROBLEMS/COMMENTS:
		An Amended and Restated First Account was filed on 1-13-10 and has been continued with reference to additional ongoing matters in this and other related cases.	Minute Order 6-7-13: Ms. Wright advises the Court that she has a petition drafted. Continued to 8-9-13.
Cont. from 060713			
	Aff.Sub.Wit.	This status hearing was set on 4-26-13.	As of 8-6-13, nothing further has been filed.
	Verified		
	Inventory	Status report filed 6-6-13 by Attorney Janet Wright states counsel met and conferred on 5-16-13 with attorneys Craig Houghton and Mark Poochigian of Baker Manock & Jensen, who represented the Executor in his initial appointment through December 2008, and in various extraordinary matters, and with Executor, to review the proposed Petition for Final Distribution on Waiver of Account.	1. Need amended account / petition for final distribution.
	PTC		
	Not.Cred.		
	Notice of Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf. Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA	Once the amendment to the estate tax return is completed, it should be possible to create a formula taking into account the allocation of fees and costs pursuant to the agreement and any credits due beneficiaries which would allow the petition to be filed and estate to be closed.	Reviewed by: skc Reviewed on: 8-6-13 Updates: Recommendation: File 9 – Salwasser
	Citation		
	FTB Notice		
		Counsel is developing a draft formula and will meet and confirm with counsel for Gary Salwasser as well as Baker Manock & Jensen. If a formula cannot be agreed upon, the Petition will be filed specifying the areas of dispute.	

Atty Roberts, Gregory J. (for Timothy E. Moore – Trustee)

Atty Moore Huston, Deborah R. (pro per – Objector)

Atty Moore, Terence E. (pro per – Objector)

Status Hearing Re: Terence Moore's Bankruptcy Proceeding in Case #12-10802

		<p>TIMOTHY MOORE, Successor Trustee's First Account and Report of Successor Trustee and Petition for its Approval, was heard on 03/18/13.</p> <p>The matter was set for a Court Trial on 04/24/13.</p> <p>Former Trustee TERENCE E. MOORE was removed per minute order 11-29-11. The order was signed 12-15-11.</p> <p>Minute Order from 04/24/13 set this matter for hearing regarding Terence Moore's bankruptcy proceeding.</p> <p>Status Declaration of Timothy Moore, Trustee, filed 08/02/13 states: The matter came before the Bankruptcy Court on 07/31/13 and the trial was continued until 12/13/13. The Trustee, Timothy Moore, requested an earlier date, but counsel for Terence Moore requested a December date. This Court was holding off on making a decision as to the allocation of costs and fees to be recovered from the beneficiaries, until after the bankruptcy trial so, if assets were recovered from the bankruptcy and put in the Trust, it would be easier for the Court to determine if it was necessary for the Court to issue an order for the recovery of funds from the beneficiaries to pay costs of the trust administration and to reimburse the Trustee for Trust expenses paid personally by Timothy Moore. As the bankruptcy trial has been continued until 12/13/13, the Trustee requests that this status hearing be continued until sometime in January of 2014.</p> <p>There is also the issue remaining regarding the appraisal and sale of a coin collection. The beneficiaries had some discussions with the Trustee regarding a possible resolution regarding the value of the coin collection and the purchase of the coin collection by a beneficiary. Those discussions failed resulting in the coin collection being appraised. The appraisal should be completed within the next 10 days and the Trustee will proceed with the sale of the coin collection as instructed by the Court. To keep costs down, it is requested that the court continue this matter until January 2014 thereby avoiding further costs and fees to the Trust and the Trustee.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p>
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
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<input type="checkbox"/>	UCCJEA		
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<input type="checkbox"/>	FTB Notice		
		<p>Reviewed by: JF</p> <p>Reviewed on: 08/06/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 10 – Moore</p>	

Status Hearing Re: Filing of Receipts for the Blocked Accounts

		<p>TIMOTHY JOHNSON, Administrator, filed his First and Final Account and Report of Personal Representative on 06/12/13.</p> <p>Order Settling First and Final Account and Report of Personal Representative was signed 07/15/13. Pursuant to the Order, the funds to be distributed to Marshall Johnson and Kimberly Johnson were to be deposited into blocked accounts.</p> <p>Minute Order from 07/15/13 set this matter for status regarding Receipts for the Blocked Accounts.</p> <p>Order to Deposit Money into Blocked Account was signed 07/23/13.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Receipts and Acknowledgment of Order for the Deposit of Money into Blocked Account <u>or</u> current written status report pursuant to Local Rule 7.5, which states: In all matters set for status hearing, verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
Cont. from			
<input type="checkbox"/>	Aff.Sub.Wit.		
<input type="checkbox"/>	Verified		
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<input type="checkbox"/>	Notice of Hrg		
<input type="checkbox"/>	Aff.Mail		
<input type="checkbox"/>	Aff.Pub.		
<input type="checkbox"/>	Sp.Ntc.		
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<input type="checkbox"/>	Objections		
<input type="checkbox"/>	Video Receipt		
<input type="checkbox"/>	CI Report		
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		<p>Reviewed by: JF</p> <p>Reviewed on: 08/06/13</p> <p>Updates:</p> <p>Recommendation:</p> <p>File 11 – Johnson</p>	

Status Hearing Re: Filing of the First Account and/or Petition for Final Distribution

DOD: 04/13/12 Cont. from <table border="1" style="width: 100%; border-collapse: collapse;"> <tr><td style="width: 50%;">Aff.Sub.Wit.</td><td style="width: 50%;"></td></tr> <tr><td>Verified</td><td></td></tr> <tr><td>Inventory</td><td></td></tr> <tr><td>PTC</td><td></td></tr> <tr><td>Not.Cred.</td><td></td></tr> <tr><td>Notice of Hrg</td><td></td></tr> <tr><td>Aff.Mail</td><td></td></tr> <tr><td>Aff.Pub.</td><td></td></tr> <tr><td>Sp.Ntc.</td><td></td></tr> <tr><td>Pers.Serv.</td><td></td></tr> <tr><td>Conf. Screen</td><td></td></tr> <tr><td>Letters</td><td></td></tr> <tr><td>Duties/Supp</td><td></td></tr> <tr><td>Objections</td><td></td></tr> <tr><td>Video Receipt</td><td></td></tr> <tr><td>CI Report</td><td></td></tr> <tr><td>9202</td><td></td></tr> <tr><td>Order</td><td></td></tr> <tr><td>Aff. Posting</td><td></td></tr> <tr><td>Status Rpt</td><td></td></tr> <tr><td>UCCJEA</td><td></td></tr> <tr><td>Citation</td><td></td></tr> <tr><td>FTB Notice</td><td></td></tr> </table>	Aff.Sub.Wit.		Verified		Inventory		PTC		Not.Cred.		Notice of Hrg		Aff.Mail		Aff.Pub.		Sp.Ntc.		Pers.Serv.		Conf. Screen		Letters		Duties/Supp		Objections		Video Receipt		CI Report		9202		Order		Aff. Posting		Status Rpt		UCCJEA		Citation		FTB Notice		<p>DARRYL GRANT, son, was appointed Administrator with Bond in the Amount \$89,000.00 on 06/12/12. Bond was filed 07/02/12 and Letters of Administration were issued on 06/15/12.</p> <p>Inventory & Appraisal filed 07/20/12 - \$67,000.00.</p> <p>Minute Order from hearing on 06/12/12 set this matter for Status regarding filing of the First Account and/or Petition for Final Distribution.</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>2. Need Accounting and/or Petition for Distribution <u>or</u> current written status report pursuant to Local Rule 7.5, which states: In all matters set for status hearing, verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p> <p>Note: Attorney J. Stanley Teixeira filed a Motion to be Relieved as Counsel that is set for hearing on 09/10/13.</p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 20px;"> <tr><td>Reviewed by: JF</td></tr> <tr><td>Reviewed on: 08/06/13</td></tr> <tr><td>Updates:</td></tr> <tr><td>Recommendation:</td></tr> <tr><td>File 14 – Grant</td></tr> </table>	Reviewed by: JF	Reviewed on: 08/06/13	Updates:	Recommendation:	File 14 – Grant
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Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 02/23/09		<p>DYANNA MATTHEWS, daughter, was appointed Executor with Limited IAEA and without bond on 01/14/13.</p> <p>Letters Testamentary were issued on 01/22/13.</p> <p>Inventory & Appraisal, partial no. 1 filed 06/21/13 - \$126,673.00</p>	<p>NEEDS/PROBLEMS/COMMENTS:</p> <p>1. Need Final Inventory & Appraisal <u>or</u> current written status report pursuant to Local Rule 7.5, which states: In all matters set for status hearing, verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.</p>
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		<div>Reviewed by: JF</div> <div>Reviewed on: 08/06/13</div> <div>Updates:</div> <div>Recommendation:</div> <div>File 15 - Brazeal</div>	

Atty **Wright, Janet L. (for Doreta Ruth Whitten – Petitioner)**Atty **Keeler, William (for Doreta Ruth Whitten – Petitioner)**Atty **Sanoian, Joanne (for Diane M. Myers – Respondent)****Status Hearing Re: Settlement Agreement**

Goldie Myers DOD: 04/20/98	DORETA RUTH WHITTEN , successor trustee, filed a Petition for Determination and Clarification of Trust Terms on 02/28/13. On 04/11/13, Diane M. Myers , Respondent, filed an Opposition to Petition for Determination and Clarification of Trust Terms. Minute Order from hearing on 04/15/13 states: The Court sets the matter for Settlement Conference on 06/03/13. Counsel is directed to submit their settlement conference statement along with courtesy copies for the Court by 05/28/13. Matter is set for Court trial on 06/28/13 with a one day estimate. Minute Order from Settlement Conference held on 06/03/13 states: Parties reach a settlement agreement as fully set forth on the record by Mr. Keeler. Parties agree to bear their own attorney's fees and costs. Parties further agree that this Court will retain jurisdiction to enforce the agreement. The Court indicates for the record that this is a resolution of all disputed claims. Upon inquiry by the Court, each party individually agrees to the terms and conditions of the settlement agreement. Payment per the agreement to be made to Ms. Sanoian's office within 5 days after the execution of the agreement. Mr. Keeler is directed to prepare the agreement for circulation to the parties within 30 days. The Court orders that Ms. Sanoian be provided a list of all accounts and assets with their values. Matter set for Status Hearing on 06/28/13. If all documents are signed by 06/28/13, no appearance will be necessary. The trial date of 06/28/13 is vacated. Status Report of Co-Counsel for Doreta Ruth Whitten filed 07/18/13 states: they have submitted the Settlement Agreement and Verification of Trust property to Joanne Sanoian, attorney for Diane Myers. They expect to receive the fully executed documents, and if there is sufficient time, to fund the settlement, prior to the 07/26/13 hearing. Respondent Diane Myers' Status Conference Statement filed 07/22/13 states: Respondent and her counsel are currently reviewing the Settlement Agreement and have only very recently received the signed, handwritten verification from Petitioner as to the value of the Trust assets.	NEEDS/PROBLEMS/COMMENTS: <u>OFF CALENDAR</u> All matters related to the settlement are now complete per Status Report of Co-Counsel for Doreta Ruth Whitten filed 08/05/13
Arthur Myers DOD: 03/25/11		
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FTB Notice		

Status Hearing Re: Filing of the Inventory and Appraisal

Age:			NEEDS/PROBLEMS/COMMENTS: <p style="text-align: center;"><u>OFF CALENDAR</u> Final Inventory & Appraisal filed 05/13/13.</p>	
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	Duties/Supp			
	Objections			
	Video Receipt			
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	Status Rpt			
	UCCJEA			
	Citation			
	FTB Notice			
				Reviewed by: JF Reviewed on: 08/06/13 Updates: Recommendation: File 18 – Coehlo

Age:			NEEDS/PROBLEMS/COMMENTS:	
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	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order			
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	UCCJEA			
	Citation			
	FTB Notice			
				<div>OFF CALENDAR</div> <div>Bond filed 07/16/13</div>
				Reviewed by: JF
		Reviewed on: 08/06/13		
		Updates:		
		Recommendation:		
		File 20 – Hansen		

Age:		NEEDS/PROBLEMS/COMMENTS:
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	Citation	
	FTB Notice	
		<p><u>OFF CALENDAR</u></p> <p>Fourth Account and Report of Conservator filed 08/05/13 and set for hearing on 09/16/13</p>
		Reviewed by: JF
		Reviewed on: 08/06/13
		Updates:
		Recommendation:
		File 21 – Perez